

# User-centred Design of Context-sensitive Help

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## Definition of Context-Sensitive Help (CSH)

- Ideally:  
Direct access to Help that is focused on the user's current needs
- In practice:  
this means Help is based on the user's current location, focus, and state within a software system

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## Why is CSH important?

- Research has shown that guidance with context is more effective than guidance without context \*

\* Antonio Capobianco, LORIA, 2003

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## What we'll look at today

- Established forms of CSH in Windows
- User-centred design goals
- The kind of information we should provide within CSH
- Possible CSH architectures
- Some guidelines on contextual Help

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## This session does *not* cover

- Map IDs, header files, APIs, and how to implement context-sensitive Help
- (Let the programmers worry about those issues!)

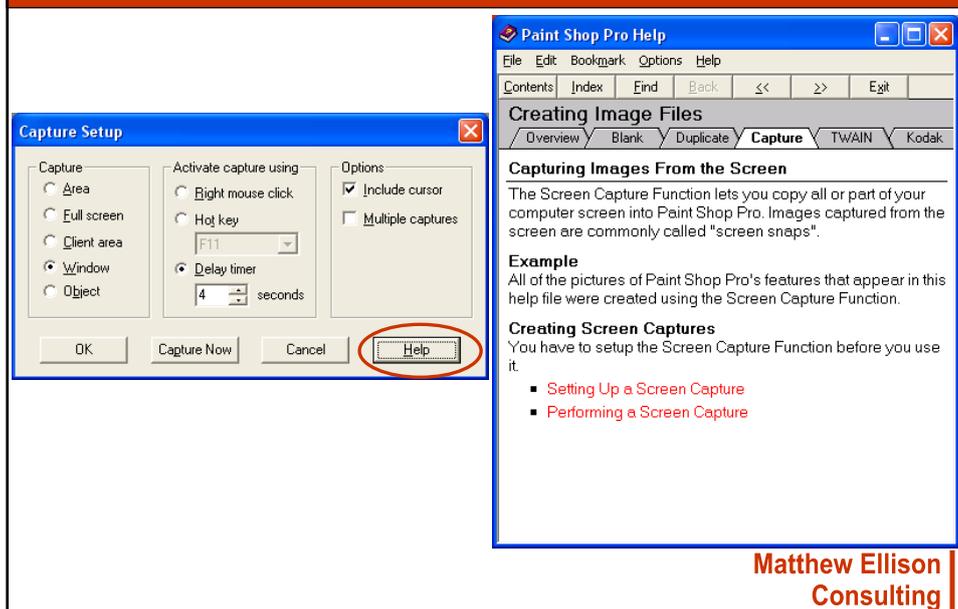
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## Established forms of CSH in Windows

- Keyboard shortcuts:
  - F1 displays Help on current window/dialog
  - Shift F1 – changes to What's This? Help mode
- Windows 95:  
trend away from screen-based Help to only What's This? Help
- 2000 onwards:  
trend away from What's This? Help to only screen-based Help
- Recent trend:  
embedded/contextual Help

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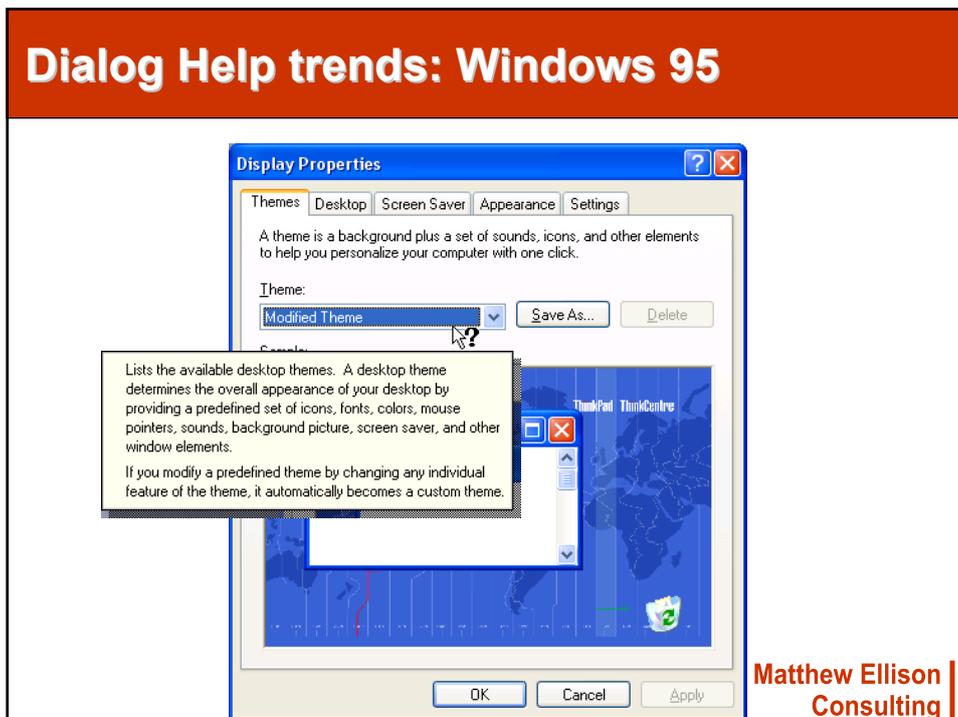
## Dialog Help trends: Windows 3.1



The screenshot displays two overlapping windows from the Windows 3.1 operating system. On the left is the 'Capture Setup' dialog box, which has a 'Help' button circled in red. On the right is the 'Paint Shop Pro Help' window, which is open to the 'Creating Image Files' section, specifically the 'Capturing Images From the Screen' topic. The help text explains the screen capture function and lists two sub-topics: 'Setting Up a Screen Capture' and 'Performing a Screen Capture'.

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## Dialog Help trends: Windows 95



The screenshot shows the 'Display Properties' dialog box in Windows 95. The 'Themes' tab is selected, and the 'Theme' dropdown menu is open, showing 'Modified Theme'. A context-sensitive help tooltip is displayed over the dropdown menu, explaining that a desktop theme determines the overall appearance of the desktop and that modifying a predefined theme creates a custom theme. The background of the dialog box shows a desktop with a world map wallpaper and a 'ThinkPad ThinkCentre' window.

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# User-centred Design of Context-sensitive Help

## Dialog Help trends: Windows 2000 →

The image shows the Windows 2000 'Font Properties' dialog box. A red circle highlights a question mark icon in the top right corner of the dialog. To the right, a 'Dynamic Help' window is open, displaying help content for 'Editing Font Properties'. The help text explains that font settings can be applied locally and provides a 'Best Practice' to use styles instead of local formatting. It also lists common ways to edit font properties: Bold, Case, Color of background, Color of text, and Font family.

## Dialog Help trends: MS Office 2007

The image shows the Microsoft Word 2007 interface. The Ribbon is visible at the top. A 'Super Tooltip' is shown for the 'Insert Caption' task, providing instructions on how to add a caption to a picture. A red circle highlights a 'Press F1 for more help.' link at the bottom of the tooltip. A 'Top-level Help menu' is shown as a separate window with a question mark icon, indicated by a red arrow. The name 'Matthew Ellison Consulting' is visible in the bottom right corner.

## What do we mean by *context* in a software system?

- Window/screen/form/dialog?
- Tab within a dialog?
- Current field/control?
- Other settings such as zoom level?
- Previous history?
- User role?
- Connectivity of PC?

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## Traditional CSH topics

- Descriptive, not procedural
- Based on current screen/dialog
  - Overview of dialog including purpose
  - How to access dialog  
(only needed if CSH topic is available using other Help navigation methods)
  - Key concept(s)
  - Description of each/every field and control
  - Links to related procedures

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## Example: RoboHelp X5



The screenshot shows a 'Font Sets dialog' window. The content is annotated with brackets on the right side, mapping sections to design categories:

- Access:** Points to the instruction 'To access this dialog: From the **Format** menu, select **Font Sets**.'
- Overview:** Points to the introductory paragraph: 'Use this dialog to view a list of all font sets in the current project, look up the fonts assigned to an existing font set, create a new font set, change an existing one, and remove font sets you do not need.'
- Concept:** Points to the explanatory paragraph: 'A font set is a collection of fonts (typefaces) that authors apply to topics either through style sheets or character and paragraph formatting. The purpose of the font set is to define the preferred (default) font that should be used to display the output on the end user's system.'
- Controls:** Points to the list of actions: **New**, **Modify**, and **Delete**.
- Related Procedures:** Points to the 'Related Topics' button at the bottom.

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## User-centred design

- **Users:**
  - typically do not consult Help ahead of time
  - are engaged in a task when they need assistance
  - will only use Help if there is "scent of information"
  - want to minimise interruption to the task
- **Goal: Keep the user in the task flow**

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## What to include in a CSH landing page?

- Reference information?
- Procedural instructions?
- Mix of both?
- Complex (unstructured)?
- How comprehensive?
  
- Help = Answers to questions
  - We need to know what the questions will be

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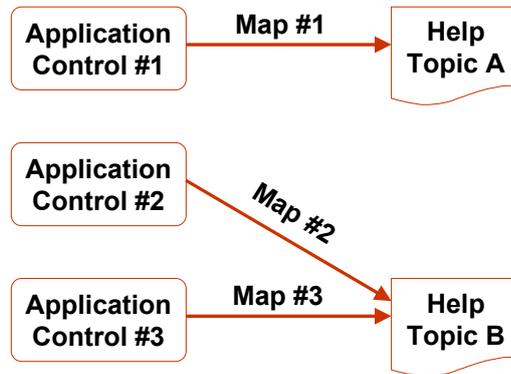
## Typical user questions when selecting CSH

- What is this screen for?
- What do I need to enter in this field?
- Why do I need to provide this information?
- What does xxx mean?
- How do I ...?  
(Perhaps less common than when user is searching Help or using the index)

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## Usual CSH Workflow

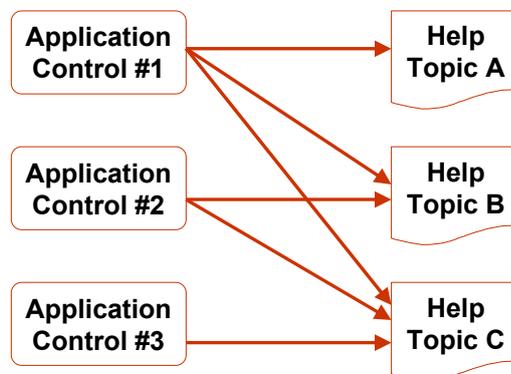
- **One to One or Many to One**



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## Potential CSH Workflow

- **One to Many**  
(a keyword-based approach)



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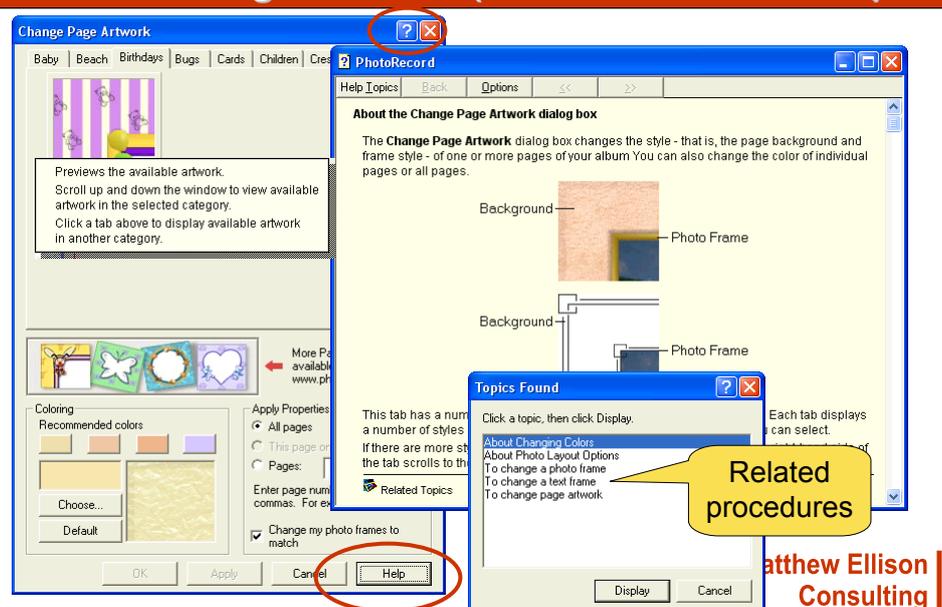
## A possible CSH strategy



- [The controls in this dialog box](#)
- [Custom animations in general](#)
- [How to make 1st level bullets reveal one by one](#)
- [How to create a default animation effect for all slides](#)

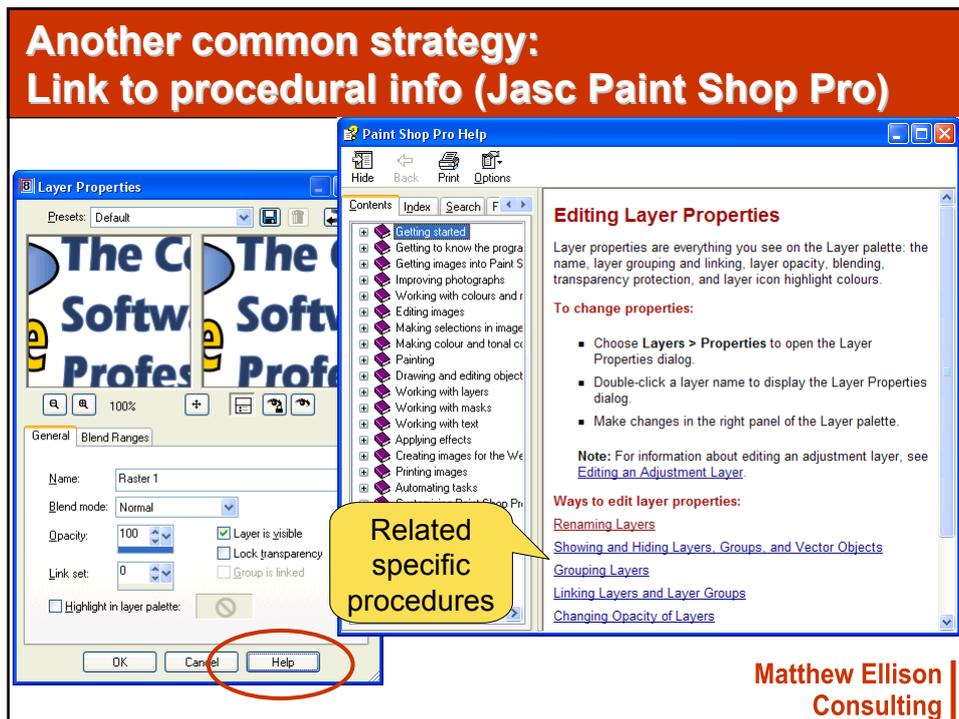
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## A common strategy: Link to dialog overview (Canon PhotoRecord)



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## Another common strategy: Link to procedural info (Jasc Paint Shop Pro)



The screenshot shows two overlapping windows. The foreground window is the 'Layer Properties' dialog box, which has a 'Help' button circled in red. A yellow callout bubble with the text 'Related specific procedures' points to this button. The background window is the 'Paint Shop Pro Help' application, displaying an article titled 'Editing Layer Properties'. The article includes a table of contents, a list of topics, and a list of ways to edit layer properties, such as 'Renaming Layers', 'Showing and Hiding Layers, Groups, and Vector Objects', 'Grouping Layers', 'Linking Layers and Layer Groups', and 'Changing Opacity of Layers'.

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## Do users *really* want procedures from CSH?

- Compare the CSH for MadCap Flare versions 3 and 4
- Information type was changed from reference to procedural, apparently in response to requests from customers

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## Example: Insert Table dialog

Question: Which of these options should I select?

CSH button

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## Flare 3: Reference topic

You are here: [User Interface Elements - How to Use Each One](#) > [Insert Table Dialog](#)

### Insert Table Dialog

For more information, see [www.madcap.com](#).

How to open this dialog:

#### Basic tab

Use this tab to make simple changes such as the number of columns and rows, AutoFit behavior, table alignment, table caption, and table style sheet associated with the table (if any).

buttons and sections:

#### Borders tab

Use this tab to set the outer borders, cell padding, and cell border settings for a table.

Explain the individual buttons and sections:

San Diego, California 92121  
Tollfree 1-888-MadCap1  
Tel 858-320-0387  
Fax 858-320-0338  
[info@madcapsoftware.com](mailto:info@madcapsoftware.com)

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## Flare 3: Reference topic expanded

The screenshot shows a 'Dynamic Help' window with a table of contents and a detailed description for 'Outer Borders'. Below the help window is a table with two columns: 'Cell Border Collapse' and its description. A yellow speech bubble points to the 'Cell Border Collapse' section.

Button/Section	Description
<b>Outer Borders</b>	Click in any of the individual fields ( <b>Left</b> , <b>Right</b> , <b>Top</b> , <b>Bottom</b> ) to specify the settings for the table border. If you click the down arrow to the right of all the fields, the settings will be applied to all of border fields. When you click that down arrow or in one of the individual fields, a small popup window displays. Use the lower-left area of the popup window to enter a number for the thickness of the border. Use the lower-middle area to select a unit of measurement (e.g., point, pixel, centimeter) for the number you

<b>Cell Border Collapse</b>	Select whether you want to collapse the cell borders in the table. If you collapse the cell borders, the row and cell borders of a table are joined in a single border. If you do not collapse the cell borders, the row and cell borders of a table are detached.
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Answer to question

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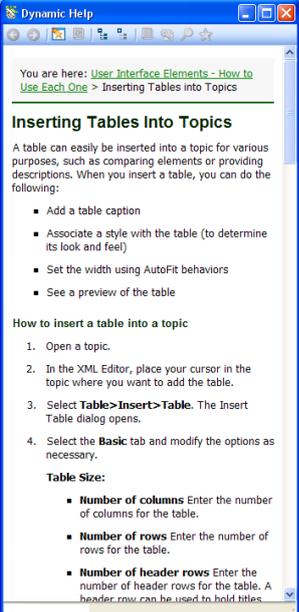
## Flare 4: same Insert Table dialog

The screenshot shows an 'Insert Table' dialog box with a 'Borders' tab. It has dropdown menus for 'Left', 'Right', 'Top', and 'Bottom' borders, all set to '(not set)'. Below these is a 'Cell Border Collapse' section with two radio button options: 'Collapse cell borders' and 'Do not collapse cell borders'. A yellow speech bubble points to the 'Cell Border Collapse' section.

Same Question: Which of these options should I select?

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## Flare 4: Procedural topic



The screenshot shows a 'Dynamic Help' window with the following content:

You are here: [User Interface Elements - How to Use Each One](#) > [Inserting Tables into Topics](#)

### Inserting Tables into Topics

A table can easily be inserted into a topic for various purposes, such as comparing elements or providing descriptions. When you insert a table, you can do the following:

- Add a table caption
- Associate a style with the table (to determine its look and feel)
- Set the width using AutoFit behaviors
- See a preview of the table

#### How to insert a table into a topic

1. Open a topic.
2. In the XML Editor, place your cursor in the topic where you want to add the table.
3. Select **Table>Insert>Table**. The Insert Table dialog opens.
4. Select the **Basic** tab and modify the options as necessary.

#### Table Size:

- **Number of columns** Enter the number of columns for the table.
- **Number of rows** Enter the number of rows for the table.
- **Number of header rows** Enter the number of header rows for the table. A header row can be used to hold titles.

**Inserting Tables Into Topics**

A table can easily be inserted into a topic for various purposes, such as comparing elements or providing descriptions. When you insert a table, you can do the following:

- Add a table caption
- Associate a style with the table (to determine its look and feel)
- Set the width using AutoFit behaviors
- See a preview of the table

#### How to insert a table into a topic

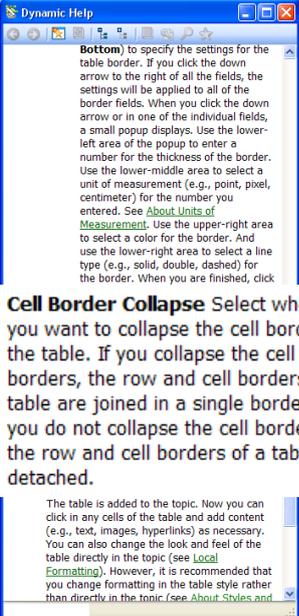
1. Open a topic.
2. In the XML Editor, place your cursor in the topic where you want to add the table.
3. Select **Table>Insert>Table**. The Insert Table dialog opens.
4. Select the **Basic** tab and modify the options as necessary.

#### Table Size:

- **Number of columns** Enter the number of columns for the table.

**Already completed**

## Flare 4: Procedural topic – scroll to answer



The screenshot shows a 'Dynamic Help' window with the following content:

**Bottom**) to specify the settings for the table border. If you click the down arrow to the right of all the fields, the settings will be applied to all of the border fields. When you click the down arrow or in one of the individual fields, a small popup displays. Use the lower-left area of the popup to enter a number for the thickness of the border. Use the lower-middle area to select a unit of measurement (e.g., point, pixel, centimeter) for the number you entered. See [About Units of Measurement](#). Use the upper-right area to select a color for the border. And use the lower-right area to select a line type (e.g., solid, double, dashed) for the border. When you are finished, click

- **Cell Border Collapse** Select whether you want to collapse the cell borders in the table. If you collapse the cell borders, the row and cell borders of a table are joined in a single border. If you do not collapse the cell borders, the row and cell borders of a table are detached.

The table is added to the topic. Now you can click in any cells of the table and add content (e.g., text, images, hyperlinks) as necessary. You can also change the look and feel of the table directly in the topic (see [Local Formatting](#)). However, it is recommended that you change formatting in the table style rather than directly in the topic (see [About Styles and](#)

**Same answer to question**

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## Link to broader procedural info (Captive 4)

Speech Setting

Select speech agent:  
Kate

Do not show

Adobe Help Viewer 2

[Learn more](#)

Search

displayed when the user plays  
header to select all the rows

To prevent slide notes from be  
the check mark.

### Add speech text to multiple slides

You can add speech text to multiple slides using the Speech Management dialog box. To add variety to the movie, you can choose different speech agents for different slides. For example you could use a male voice and a female voice for alternate slides.

1. In the Speech Text column of the Speech Management dialog box, click Browse (...)
2. In the Speech Text column of the Speech Management dialog box, click Browse (...)
3. In the Slide Text To Audio dialog box, enter the text that you want to convert to speech.
4. From the Speech Agent column, select a speech agent for the slide.

Powered by Adobe RoboHelp

User could not possibly require help on how to use this dialog

Design of link implies broadening of knowledge

Help topic is not specifically designed for this CSH link

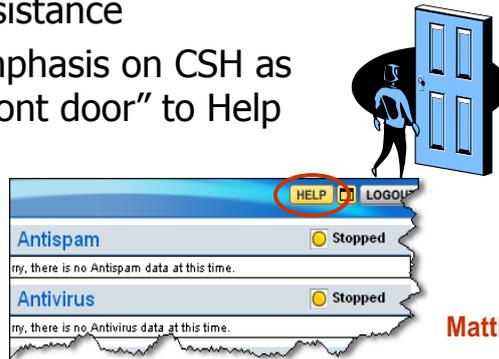
## My own view on this issue

- CSH needs to provide quick and easy answers to mid-task questions
- These questions are often reference-based
  - "What is this?"
  - "What should I enter?"
  - "Which should I select?"
- I question whether procedural topics can be usefully re-used as CSH topics

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## IBM's Task support clusters

- Presented by Michael Hughes at WritersUA Conference in Portland, Oregon (March 2008)
- A micro-architecture for user assistance
- Emphasis on CSH as "front door" to Help

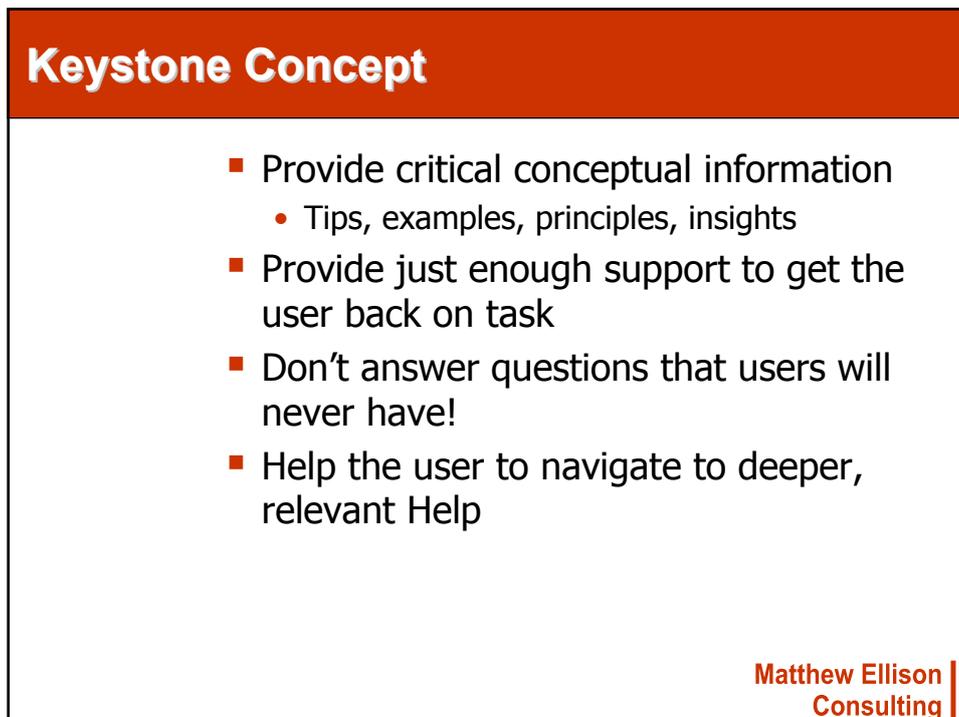
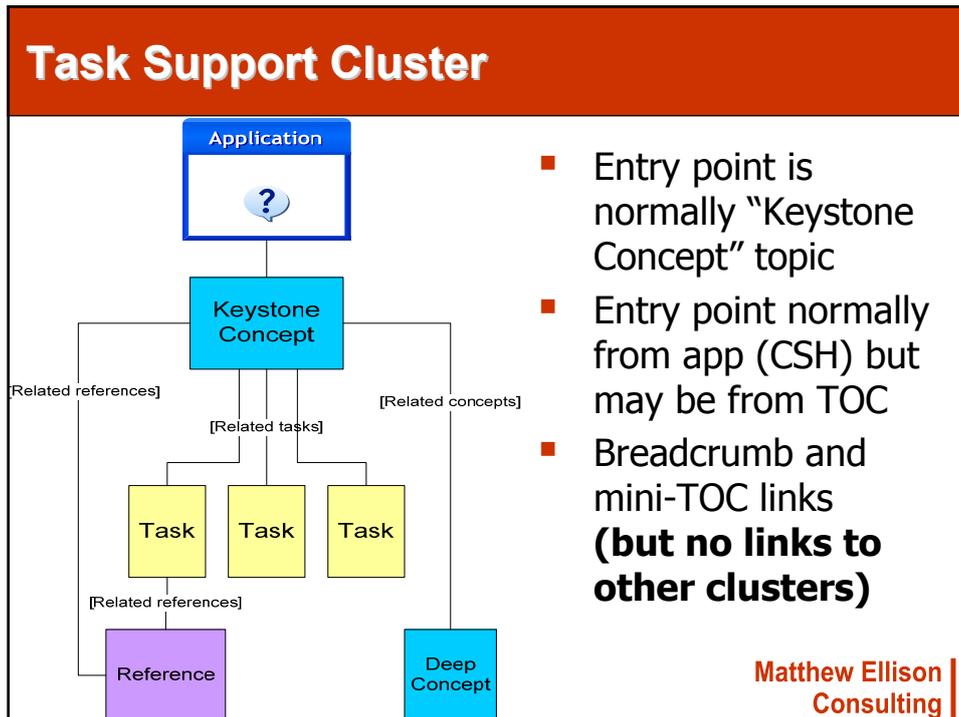


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## Strategy

1. Identify context sensitive links
2. Design a *task-support cluster* :
  - Self-contained group of topics that support a specific task

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## Example of Keystone Concept topic

The screenshot shows a web-based help application titled "Proventia Network MFS Help". On the left is a navigation tree with categories like "Home", "Configurable", "Antispam", "Antivirus", "Firewall", "Intrusion", "Issue", "Objects", "Dynat", "Netw", "SSLVP", "QOS", "SSLVPN", "System", "Applia", "DHCP", "High", "Netw", "Notific", "Passw", "Servic", "SiteP", "Time", "Web Fil", "Web F", "Web F", "Logs", "System U", "Maintenance", "Status", "Antispam", "Antivirus", "Firewall", and "Intrusion". The "Alerts" topic is selected. The main content area displays the "Alerts" page, which includes a "Fundamentals" section with a "Welcome" message, an "Attention" note about clearing alerts, and a "Risk levels" section. The "Risk levels" section contains a table with three rows: High, Medium, and Low. Each row has a "Level" column and a "Description" column. The "High" level description mentions security issues that allow remote or local access. The "Medium" level description mentions security issues that have the potential of granting access. The "Low" level description mentions security issues that deny service. Below the table are "Tips" and "Related tasks" sections.

**Alerts**

Use the Alerts page to view and manage alerts that the Proventia Network MFS appliance has generated.

**Attention:** If you click on "Clear current Alerts from event log" all alerts are immediately removed. It is a good practice to generate a new log file from the current alerts before clearing them from the event log. That way, you have a record you can refer to.

**Risk levels**

The Alerts page categorizes alerts by risk level according to the following criteria:

Level	Description
High	Security issues that allow immediate remote or local access, or immediate execution of code or commands, with unauthorized privileges. <b>Examples:</b> Most buffer overflows, back doors, default or no password, and bypassing security on firewalls or other network components.
Medium	Security issues that have the potential of granting access or allowing code execution by means of complex or lengthy exploit procedures, or low risk issues applied to major Internet components. <b>Examples:</b> Cross-site scripting, man-in-the-middle attacks, SQL injection, denial of service of major applications, and denial of service resulting in system information disclosure (such as core files).
Low	Security issues that deny service or provide non-system information that could be used to formulate structured attacks on a target, but not directly gain unauthorized access. <b>Examples:</b> Brute force attacks, non-system information disclosure (configurations, paths, etc.), and denial of service attacks.

**Tips**

- Click the name of an alert to see a detailed description of that alert
- Click the  icon next to an alert name to read a description written by the IBM ISS X-Force team of threat researchers.
- Click the  icon next to an antivirus alert to see detailed analysis data about that virus.

**Related tasks**

- [Viewing alerts](#)
- [Generating new log files from alerts](#)
- [Clearing current alerts from the event log](#)
- [Viewing and managing log files](#)

## How do we treat CSH as part of main Help?

- Searchable?
- Include in Index?
- Include in TOC?
  - If so, where?
  - Grouped with relevant task-based topics?
  - In special UI reference section?
- Perhaps it doesn't really matter

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## Contextual Help

- Additional information that supplements/supports the main UI
- Assistance that is displayed in a pop-up window or beside some key fields
- Answers common questions without requiring users to leave the application UI
- Favoured by web applications

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## Options for displaying contextual Help

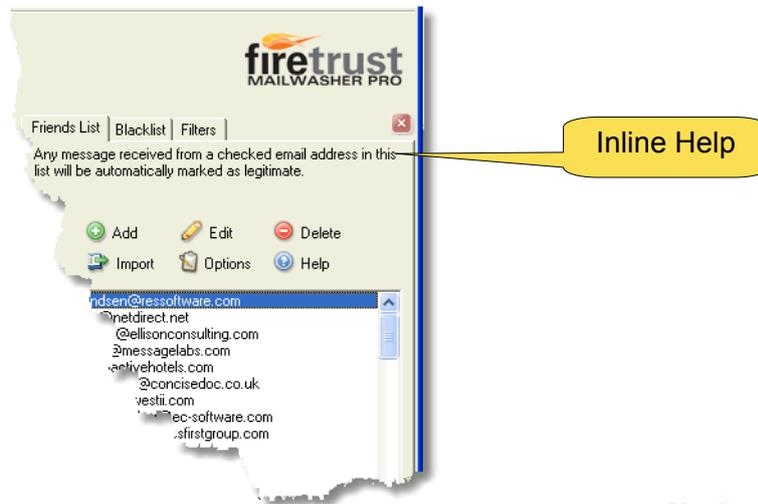
- "Inline" Help
- Expanding/drop-down text
- Dedicated embedded window
- Pop-up window

"Help may in fact be a great example of an appropriate pop-up: the text should definitely be short and it is best to be able to see the help without changing or obscuring the original context"

Jakob Nielsen

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## Inline Help example: MailWasher Pro



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## Inline Help: Guidelines from Sun

Scope of the Inline Help	Recommended Length
An entire page of an application	One to three short sentences
A page section that is titled or otherwise visually separated	One short sentence
A single entry field	One short sentence or, preferably, one phrase

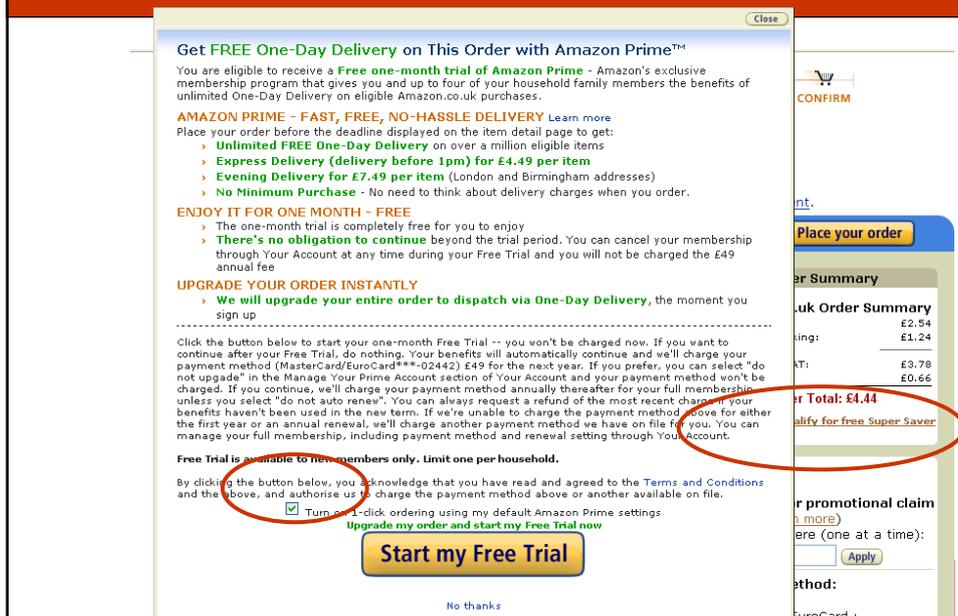
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# User-centred Design of Context-sensitive Help

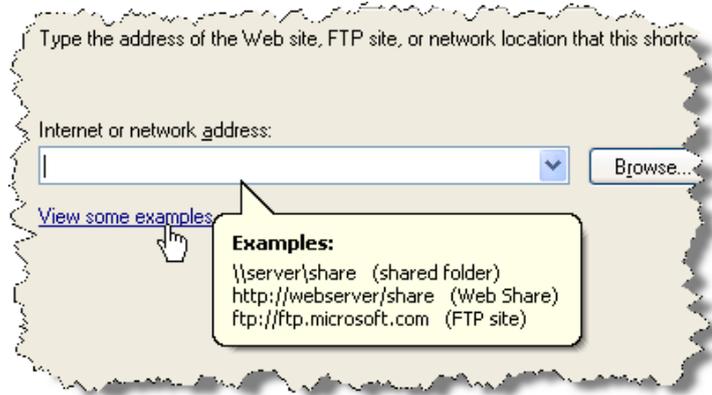
## Pop-up example: BBC



## Pop-up example: Amazon



## Contextual Help in desktop applications: Windows XP



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## Contextual Help in desktop applications: QuickBooks 2008

MS HTML Help viewer

Where do I find this information?

Help topic is not specifically designed to answer this question

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This image shows a screenshot of the QuickBooks 2008 help viewer. The window title is 'QuickBooks Help'. The main content area displays a help topic titled 'Setting up VAT when you create a company file'. The text explains that users need to enter their VAT Registration number and provides a link to 'enter your VAT payment schedule'. A red circle highlights a blue link 'Where do I find this information?' within the text. A yellow callout box points to this link with the text 'Help topic is not specifically designed to answer this question'. Another yellow callout box points to the window title bar with the text 'MS HTML Help viewer'. At the bottom right, there are 'Next' and 'Cancel' buttons and the text 'Requires an Internet connection'.

## Contextual Help in desktop applications: QuickBooks 2008

The screenshot shows a VAT return summary screen. At the top, it displays tax amounts: "Box 9 Total net value of acquisitions to other UK member states" and "Uncategorised Tax Amounts", both at 0.00. Below this, it states "You owe VAT of £0.00 to HMRC VAT".

Three help entry points are identified with red circles and callouts:

- Help Entry point #1:** A red circle highlights the text "When do I need to make a VAT adjustment?" which is a link located below the "Adjust VAT Return..." button.
- Help Entry point #2:** A red circle highlights the text "Tell me more about printing my VAT return" which is a link located below the "Print VAT Return..." button.
- Help Entry point #3:** A red circle highlights the "Help" button located at the bottom right of the screen, next to "File VAT Return" and "Cancel" buttons.

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## Help Entry point #1

The screenshot shows the QuickBooks Help window. A search for "vat company file" has been performed, resulting in a list of 10 topics. The first topic is "Reasons for adjusting your VAT liability (what you owe)".

Two callouts highlight specific features:

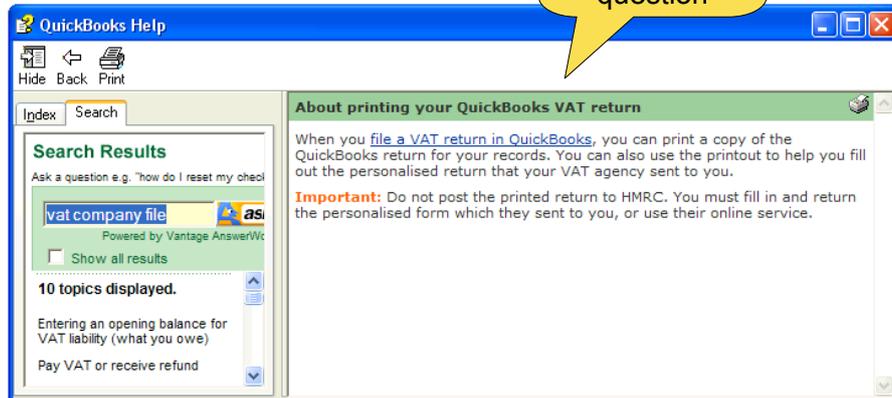
- Answers the question:** A yellow callout points to the text "When do I need to make a VAT adjustment?" from the previous slide, which is now shown as a search result in the help window.
- Link to related procedure:** A yellow callout points to a blue hyperlink "Adjusting your VAT liability (what you owe)" under the "See also" section.

## Help Entry point #2

print after you file your VAT return.

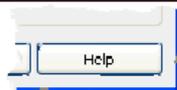
[Tell me more about printing my VAT return](#)

Answers the domain-based "question"



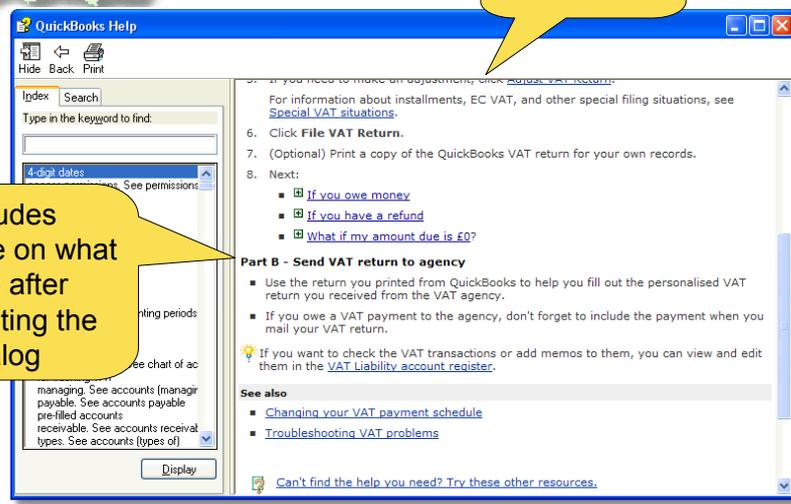
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## Help Entry point #3

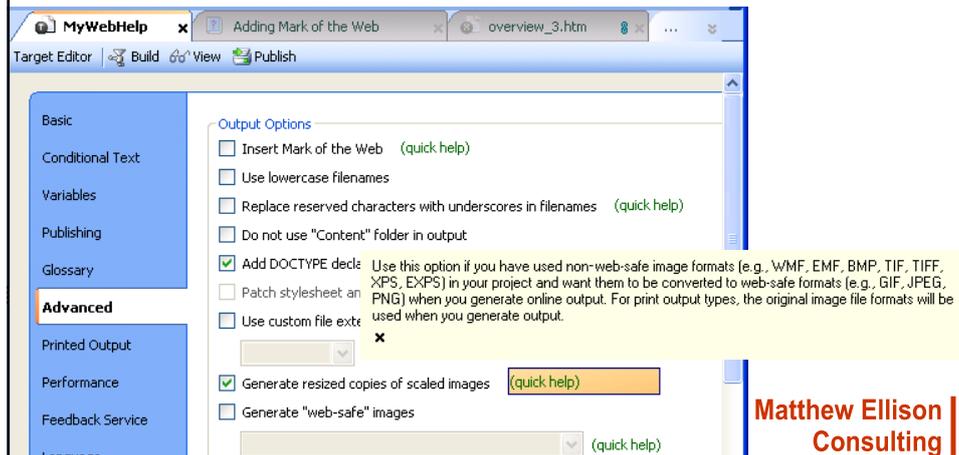


Procedural topic

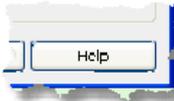
Includes guidance on what to do after completing the dialog



## Contextual Help in desktop applications: MadCap Flare 4



## MadCap Software and Intuit – a common CSH strategy

<b>This control:</b>	<b>...displays this type of information:</b>
Main Help control 	step-by-step instructions on the current task
Hyperlink beside individual field 	answer to specific question

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## Only add contextual Help where it is needed

Enquiry Form

Activate/Click a Help icon to open or close help.

Subject (required) ⓘ  
Please select a subject in the dropdown list.

Select a Subject ▾

Name (required) ⓘ  
Please enter your full name in the textbox.

\_\_\_\_\_

Email (required) ⓘ  
Please enter your email address in the textbox.

\_\_\_\_\_

Message (required) ⓘ  
Please enter your message in the textbox.

\_\_\_\_\_

Send Me Updates (optional) ⓘ  
Check the box if you want to receive updates.

Submit Enquiry

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## Layered Contextual Help: Linking to “Deeper” Help

- Contextual Help may not answer users’ specific questions
- Users may require:
  - More detailed information
  - Key concepts
  - Step-by-step instructions
- Optional links within contextual Help provide a solution

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## Example: IBM Infopops



This view shows build problems and tasks (reminders) that are either user-created or are automatically generated during building.

- [Views](#)
- [Tasks View](#)
- [Open dynamic help](#)



- Help browser opens to selected topic
- List of related links stays in the left hand frame

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## Example: Flare's Quick Help

Output Options

- Insert Mark of the Web (quick help)
- Use lowercase filenames

If this option is enabled, the output will be generated with the Mark of the Web (MOTW). For more information, click the Help icon to the right.

x

Help Topic

You are here: [Features](#) > [WebHelp](#) > Adding Mark of the Web

### Adding Mark Of The Web

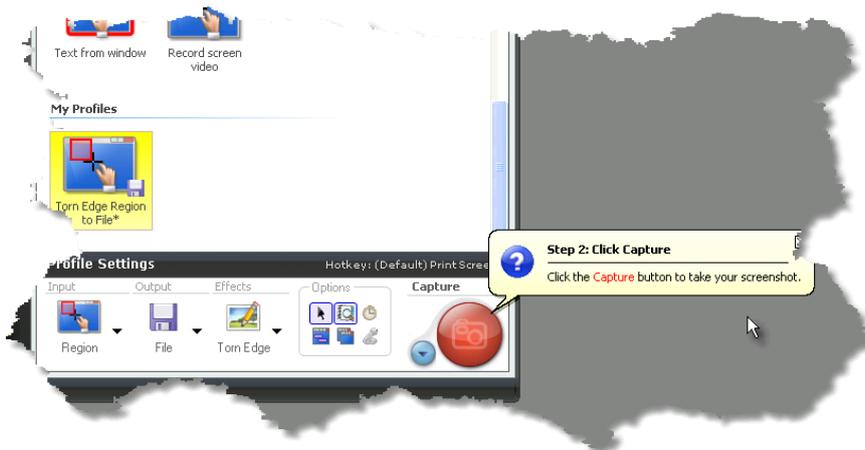
Mark of the Web (MOTW) is a comment added to the HTML markup for a web page. When users open the web page from their local machine, Internet Explorer references this comment to determine the security zone in which it should run the page. This means you can deliver WebHelp or WebHelp Plus output without your online Help initially being blocked on the user's machine with this security message:

## Future possibilities: Procedural contextual Help

- Provides sequence in addition to description and explanation
- Two possible implementations:
  - Balloon Help
  - Guided Help

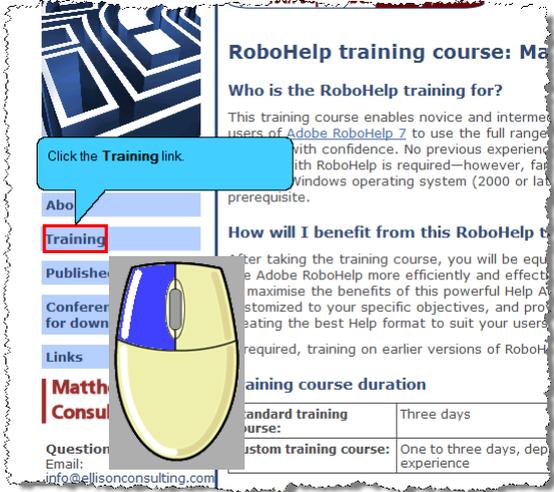
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## Balloon Help in Snagit 9.2



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Guide Help



**RoboHelp training course: Ma**

**Who is the RoboHelp training for?**

This training course enables novice and intermediate users of Adobe RoboHelp 7 to use the full range of features with confidence. No previous experience with RoboHelp is required—however, familiarity with Windows operating system (2000 or later) is a prerequisite.

**How will I benefit from this RoboHelp training course?**

After taking the training course, you will be equipped to use Adobe RoboHelp more efficiently and effectively, to customise the benefits of this powerful Help Authoring tool to your specific objectives, and to create the best Help format to suit your users' needs. No previous experience is required, training on earlier versions of RoboHelp is not required.

Training course duration	
Standard training course:	Three days
Custom training course:	One to three days, dependent on experience

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SHO Player  
(free to distribute)



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## Summary

- CSH may be the most frequent way that users access Help
- You should plan your CSH strategy and write dedicated CSH topics
- Focus on answering likely questions rather than documenting the application
- Procedural CSH is becoming popular
- Contextual Help with links to regular Help topics may be an effective strategy
- Work with UI developers on designing CSH access and contextual Help
- Guided Help may be an effective way of providing procedural assistance in context

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## References

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- *Context Sensitive Help Concepts* by Don Lammers  
<http://tinyurl.com/6xular>
- *Accessing context-sensitive help* (guidelines from IBM Eclipse documentation)  
<http://tinyurl.com/5r5xpx>
- *Access points for context sensitive help* (discussion from IxDA archives)  
<http://tinyurl.com/5lbhsc>
- *User Assistance Design Patterns* (WritersUA Conference 2007) by Scott Boggan  
<http://tinyurl.com/6h6fqo>

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## References

- *Contextual Help* (Sun Web Application Guidelines)  
<http://tinyurl.com/6xeu93>
- *The Anatomy of a Help File: An Iterative Approach* by Michael Hughes  
<http://tinyurl.com/5qf7gp>
- *Keeping It in Context Part Deux: Contextual Help* by Kimmy Paluch  
<http://tinyurl.com/6y2tbd>
- *Contextual Help and its Effects on Human Working Memory Load* (proposal for Contextual Help in KDE)  
<http://tinyurl.com/6dtw3b>
- *Context-sensitive Help For Multimodal Dialogue* (AT&T Labs – Research)  
<http://tinyurl.com/5hew5l>

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# Questions?

Please complete your  
evaluation forms



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